

STATEWIDE PROPERTY INVENTORY
STATE OWNED REAL PROPERTY
DATA ENTRY
INSTRUCTION MANUAL

PART 1

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INTRODUCTION

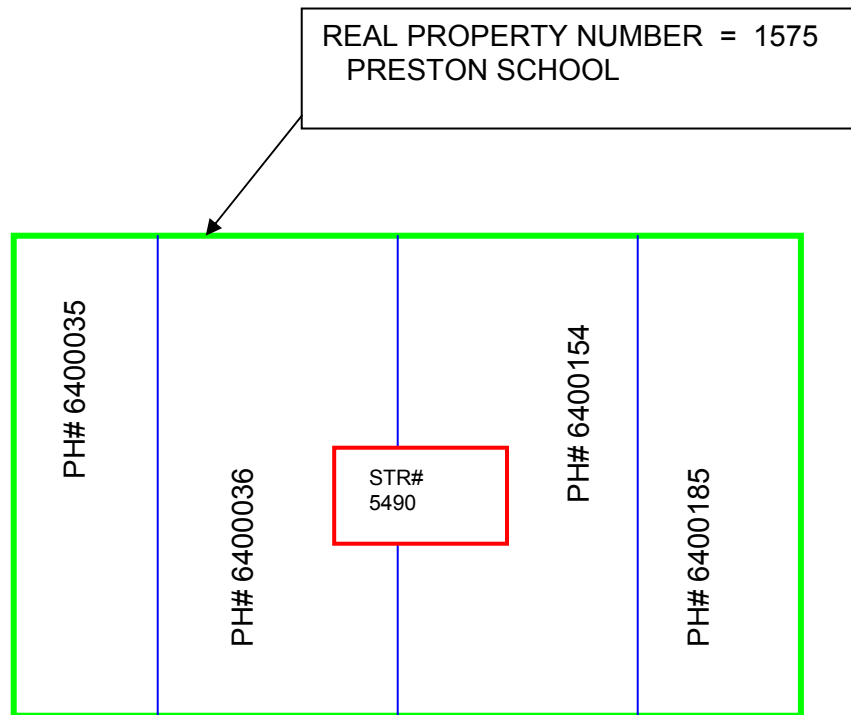
Pursuant to Chapter 907/1986, Government Code Section 11011 was amended to further the state's comprehensive planned management of its real property. This statute designated the Department of General Services (DGS) to complete and maintain a comprehensive centralized inventory of all state owned real estate assets for all state agencies.

As required by law, the DGS created the initial property inventory by the January 1, 1989 delivery date. This computerized property inventory database is now more commonly referred to as the Statewide Property Inventory (SPI).

Pursuant to GC Sec. 11011.15 and 11011.17, each state agency shall furnish the DGS with a record of their real property holdings and are required to update that information annually by July 1 of each year. Each agency is required to furnish the DGS a record of each parcel of real property it possesses in the format specified by the DGS. The requirement in GC Sec. 11011 for agencies to utilize the DGS' format when submitting their annual real property data is extremely important as this ensures consistency and accuracy of the property records. Upon receipt of the agencies' submitted information, DGS updates the SPI database to reflect any changes in the state's real estate holdings.

Page 4 of this manual illustrates how the data has been organized in the database.

DATA ORGANIZATION FOR THE STATEWIDE PROPERTY INVENTORY



The Real Property Number (RP#) is assigned to a parcel or group of parcels of land that have a common purpose and common name, for which a state agency has fee, easement, mineral or other ownership rights.

Each parcel of land acquired for a Real Property is assigned a unique Parcel History Number (PH#). In addition, a Parcel Series Number (Ser#) will be assigned to each Parcel History Number (PH#) for a particular property right. The RP# will be the foreign key for each parcel record.

Each structure located on the Real Property is assigned the next unique Structure Number (Str#) available. The structure is related to the overall Real Property and not to an individual parcel. The RP# will be the foreign key for the Structure record.

STATEWIDE PROPERTY INVENTORY
INSTRUCTIONS FOR COMPLETING
REAL PROPERTY DATA ENTRY FORM 1010

REAL PROPERTY DATA ENTRY FORM

1. Action type (Mandatory) ☐ Add ☐ Change ☐ Delete

AGENCY

2. UCM Agency Number: _____

3. Agency Name 1. _____

2. _____

4. Agency Acronym: _____

REAL PROPERTY

5. Real Property Number: _____

6. Real Property Name: _____ (50 characters)

7. Agency Property Number: _____ 8. Billing Code: _____

9. Agency Region: _____ 10. Thomas Bros.: Map Book _____ Page _____ Grid _____

11. Bond Funds: __ 12. Bond Amount: \$_____

13. Payments Per Year: ____ 14. Payment Amount \$_____

15. Commence Term Date: ____/____/____ 16. End Term Date: ____/____/____

17. Outstanding Dollar Amount: \$_____ 18. Balance Date: ____/____/____

19. Real Property Description:

20. Estimated Value: \$_____

21. Date of Estimate: ____/____/____

22. Real Property (*Estimate*) Comments:

REAL PROPERTY CHARACTERISTIC(S)

23. Real Property Characteristic Code: _____

24. Applicable Date: ____/____/____

25. Real Property Characteristic Comments:

23. Real Property Characteristic Code: _____

24. Applicable Date: ____/____/____

25. Real Property Characteristic Comments:

ADJOINING REAL PROPERTY CHARACTERISTIC(S)

26. Adjoining Property Characteristic Code: _____ 27. Applicable Date: ____/____/_____
28. Adjoining Property Characteristic Comments:

26. Adjoining Property Characteristic Code: _____ 27. Applicable Date: ____/____/_____
28. Adjoining Property Characteristic Comments:

REAL PROPERTY USE(S)

29. Land Use Code: _____ 30. Current Use Acres: _____ 31. Surplus Flag: ____
32. Estimated Value: \$_____ 33. Date of Estimate: ____/____/_____
34. Current Program Use Code: _____
35. Projected Program Use Code: _____ 36. Projected Program Use Date: ____/____/_____
37. Real Property Use Comments:

29. Land Use Code: _____ 30. Current Use Acres: _____ 31. Surplus Flag: ____
32. Estimated Value: \$_____ 33. Date of Estimate: ____/____/_____
34. Current Program Use Code: _____
35. Projected Program Use Code: _____ 36. Projected Program Use Date: ____/____/_____
37. Real Property Use Comments:

REAL PROPERTY DATA ENTRY FORM

PURPOSE OF RESD FORM 1010

The RESD Form 1010 is used for reporting the unique information that identifies a Real Property. The form is also used to report the uses and characteristics of the property along with the uses of property adjoining the Real Property owned or controlled by a state agency. For Statewide Property Inventory (SPI) purposes a Real Property may consist of an individual parcel of land or a group of parcels that have a common purpose and name. The state agency may have fee title, easement, mineral, or other ownership rights to the Real Property.

INSTRUCTIONS AND DEFINITIONS

The costs reported to the SPI should be reconciled with the agency's fixed assets ledger. An annual audit is performed by the Bureau of State Audits for discrepancies between records maintained by the agency, the SPI and the State Controller's Office.

1. **Action Type (Mandatory)** – Check the appropriate box for the type of action to be taken. This identifies the action that will be taken to process a particular record. There are three action types:
 - Add – Use this action type when entering a new Real Property record to the SPI for the first time.
 - Change – Use this action type when any change is being applied to an existing Real Property record.
 - Delete – Use this action type to remove an existing Real Property record from the SPI database. This process will not be allowed until all lower level records for a Real Property have been deleted first.

AGENCY

2. **UCM Agency Number (Mandatory)** – Enter the appropriate Uniform Codes Manual (UCM) Organization Code for the agency that owns or has jurisdiction of the Real Property. See www.dof.ca.gov/html/calstars/ucm.htm for a listing of all current UCM Codes or see a listing of UCM Codes used by the SPI on page 36 – Agency Table.
3. **Agency Name** – Enter the name of the agency as listed in the UCM. See a listing of Agency Names used by the SPI on page 36 – Agency Tab.
4. **Agency Acronym** – Enter the standard abbreviation for an agency's name. See a listing of Agency Acronyms used by the SPI in the file folder labeled "2004 Code Tables – Agency Table.doc" on the SPI 2004 Annual Verification CD. Correct your Agency's Acronym if it is incorrect.

REAL PROPERTY

5. **Real Property Number (Mandatory)** – The Real Property Number (RP#) is assigned by the Real Estate Services Division (RESA), Statewide Property Inventory (SPI) Unit and uniquely identifies the Real Property for all new properties. The agency should leave this field blank or contact the SPI Unit to have an R P# assigned to the new record.

RP's for existing properties can be obtained from the agency's records or from the SPI. Changes and deletes to the Real Property record cannot be processed without this number. All lower level records for a Real Property must be deleted prior to the Real Property record being deleted: i.e., Structure(s), Parcel(s), etc.

6. **Real Property Name (Mandatory)** - No entry is required if "Change" or "Delete" was checked in item 1 or item 5 was completed. Enter the name that uniquely identifies the Real Property if "Add" was checked in item 1.
7. **Agency Property Number** – A number, or set of numbers and letters, used by the agency to identify their real properties for internal recording and tracking purposes. This number is used to assist the agency in reconciling the SPI records to the agency's records.
8. **Billing Code** - For SPI Use Only. No action is necessary.
9. **Agency Region** – An identification used by the agency to organize their real properties into specific geographic areas. An agency may refer to this field by other names such as districts, regions, etc. The region/district can be identified using ten characters: i.e., District 10, Region IX, etc. Completing this item will enable reports to be generated by a particular region/district.
10. **Thomas Bros** - This item is optional. This item would be completed using a Thomas Brothers Map book. Indicate the map book name: (i.e., Sac for Sacramento), the page number and grid in which the property is located.
11. **Bond Funds** - Enter "Yes" or "No" to indicate whether bonds were used to finance the acquisition or construction of a property/structure.
12. **Bond Amount** – If "Yes" was entered in item 11, enter the total dollar amount of bond funds used in the acquisition and/or construction on the Real Property.
13. **Payments per Year** – If item 12 is completed, enter the number of payments agreed to be made within a period of one year in the retirement of the bonds.
14. **Payment Amount** – If item 12 is completed, enter the dollar amount agreed to as payment to retire the bonds.
15. **Commence Term Date** - If item 12 is completed, enter the beginning date of a contract, agreement, sale, etc.
16. **End Term Date** - If item 12 is completed, enter the ending date of a contract, agreement, sale, etc.
17. **Outstanding Dollar Amount** - This item is optional. It is the total dollar amount (principal and interest) remaining to be paid in order to retire the bond obligation based on the balance date at the time of review.
18. **Balance Date** - If item 17 is completed, enter the date when the outstanding dollar amount remaining to retire the bond obligation was calculated.
19. **Real Property Description** – Enter a concise description of the Real Property that identifies its boundaries and any pertinent features. This is not necessarily the legal description: i.e., Block bounded by N and O Streets and 7th and 8th Streets.
20. **Estimated Value** – Enter the estimated value of the Real Property. This is not necessarily an appraised value.

21. **Real Property (Estimate) Comments** - If item 20 is completed, enter any pertinent information regarding the estimated value of the Real Property.
22. **Date of Estimate** - If item 20 is completed, enter the date that the value of the Real Property was estimated.

REAL PROPERTY CHARACTERISTIC(S)

23. **Real Property Characteristic Code** - Enter the code corresponding to a characteristic of the Real Property. See a listing of Real Property Characteristics used by the SPI on page 96 – Property Characteristics Table.
24. **Applicable Date** - If item 22 is completed, enter the date used to determine when the Real Property Characteristic applied.
25. **Real Property Characteristic Comments** – Enter any pertinent comments related to the Real Property Characteristic.

ADJOINING REAL PROPERTY CHARACTERISTIC(S)

26. **Adjoining Property Characteristic Code** - Enter the code corresponding to a characteristic of the Adjoining Real Property. See a listing of Real Property Characteristics used by the SPI on page 96 – Property Characteristics Table.
27. **Applicable Date** - If item 26 is completed, enter the date used to determine when the Adjoining Real Property Characteristic applied.
28. **Real Property Characteristic Comments** - Enter any pertinent comments related to the Adjoining Real Property Characteristic.

REAL PROPERTY USE(S)

29. **Land Use Code** – Enter the Use Code(s) that specifically applies to the Real Property or portion thereof. Multiple Real Property Use records may be entered for a Real Property. See a listing of Use Codes used by the SPI on page 102 – Use Table.
30. **Current Use Acres** – Enter the number of acres for the area specified in the land use record. A Real Property can have multiple uses and would, therefore, indicate Current Use Acres associated with each Land Use record.
31. **Surplus Flag** – Enter “Yes” or “No” to indicate whether or not the parcel or portion thereof described in the Real Property Use record has been declared surplus.
32. **Estimated Value** - If item 31 is completed, enter the estimated value of the property identified in the Real Property Use record. The estimated value may not necessarily be an appraised value.
33. **Date of Estimate** - If item 31 is completed, enter the date when an estimate was made for the property identified in the Real Property Use record.

34. **Current Program Use Code** - A code that identifies the agency's Current Program Use status for a Real Property. A program is defined as a group of interdependent or interrelated activities directed toward the achievement of a common goal or objective: i.e., operation of a prison facility. Use one of the following codes:

Codes: 1000 – Used for state program
9000 – Not used for state program
9100 – Declared surplus – encumbered by a lease

35. **Projected Program Use Code** - A code that identifies the agency's projected Program Use status for a Real Property. This item will use the same code entered in item 29 until it is anticipated that the use will change. Use one of the following codes:

Codes: 1000 – Used for state program
9000 – Not used for state program
9100 – Declared surplus – encumbered by a lease

36. **Projected Program Use Date** - Enter the date the Real Property entered into service or the projected date when the use status of the Real Property will change.

37. **Real Property Use Comments** – Enter the concise location description and any pertinent comments for the Real Property Use record.

STATEWIDE PROPERTY INVENTORY
INSTRUCTIONS FOR COMPLETING
PARCEL DATA ENTRY FORM 1020

PARCEL DATA ENTRY FORM

1. Action type (Mandatory) ☐ Add ☐ Change ☐ Delete

REAL PROPERTY

2. Real Property Number: _____

3. Real Property Name: _____

CURRENT PARCEL SERIES

4. Group Type Code: ____

5. Parcel History Number: _____

6. Parcel Series: _____

7. Agency Parcel Number: _____

8. Address Number: _____

9. Address Street: _____

10. Address 2: _____

11. City Code: _____

12. County Code: _____

13. State Code: _____

14. Country Code: _____

15. Original Acreage: _____

16. Current Parcel Series Comments:

ACQUISITION HISTORY LAND

17. Grantor: _____

18. Manner Acquired Code: _____

19. Instrument Date: ____/____/____

20. Recorded Date: ____/____/____

21. Recorded Book/Date: _____

22. Recorded Page/Doc.#: _____

23. Percent Ownership: _____

24. Transaction Acreage: _____

25. Transaction Fiscal Year ____/____ (YYYY/YYYY)

26. Purchase Price: \$_____

27. Estimated Gift Value: \$_____

28. Acquisition Cost: \$_____

29. Primary UCM Funding Source Number: _____

30. Multiple Funding Flag: ____

31. Document Number: _____

32. Title Insured Flag: ____

CURRENT PARCEL CHARACTERISTIC(S)

33. Parcel Characteristic Code: _____

34. Commence Term Date: ____/____/____

35. End Term Date: ____/____/____

36. Current Parcel Characteristic Comments:

33. Parcel Characteristic Code: _____

34. Commence Term Date: ____/____/____

35. End Term Date: ____/____/____

36. Current Parcel Characteristic Comments:

33. Parcel Characteristic Code: _____

34. Commence Term Date: ____/____/____

35. End Term Date: ____/____/____

36. Current Parcel Characteristic Comments:

CURRENT PARCEL SERIES LOCATION(S)

37. Base Meridian Code: ____ Township: ____ Range: ____ Section: ____

37. Base Meridian Code: ____ Township: ____ Range: ____ Section: ____

37. Base Meridian Code: ____ Township: ____ Range: ____ Section: ____

37. Base Meridian Code: ____ Township: ____ Range: ____ Section: ____

37. Base Meridian Code: ____ Township: ____ Range: ____ Section: ____

37. Base Meridian Code: ____ Township: ____ Range: ____ Section: ____

CURRENT ASSESSOR PARCEL(S)

38. Assessor: Book _____ Page _____ Number _____

38. Assessor: Book _____ Page _____ Number _____

38. Assessor: Book _____ Page _____ Number _____

38. Assessor: Book _____ Page _____ Number _____

38. Assessor: Book _____ Page _____ Number _____

38. Assessor: Book _____ Page _____ Number _____

PARCEL DATA ENTRY FORM

PURPOSE OF RESD FORM 1020

The RESD Form 1020 is used for reporting the unique historical, ownership, location and fixed assets information about the parcel(s) acquired for a Real Property. A Real Property may consist of one or many acquisition parcels. Each parcel acquired for a Real Property must be identified by a unique Parcel History Number (PH#). All new parcel acquisitions will be assigned a PH# by the Statewide Property Inventory (SPI) Unit when the recorded documents are sent in for processing. The original acquisition documents are stamped with the PH# and filed with the Secretary of State, Archives for permanent retention. The agency will receive a copy of the first page of the acquisition document with the PH# affixed and a RE-21 parcel report to verify information entered on the SPI database.

The unique information entered for an acquisition parcel is the historical information specifically related to the acquisition of the parcel in which the state has fee or other ownership interests. The dollar amounts to be entered for the Purchase Price, and Estimated Gift Value are the **historic costs** associated with the purchase or acquisition of the parcel. The agencies may at their discretion separate the acquisition costs from the Purchase Price and report them in the Acquisition Cost field. These historic costs are not adjusted to reflect the current market value of the parcel.

INSTRUCTIONS AND DEFINITIONS

All data fields must be completed for a parcel regardless of the cost of the Parcel in order to meet the requirements of California Government Code Section 11000-11019.9.

The following sections of the State Administrative Manual (SAM) provide additional information and instructions for reporting land parcels and costs:

- 8600 – Property Accounting
- 1322 - Acquisition (Transfers of Possessions Between State Agencies)
- 1322.14 - Gifts
- 1322.17 - State Property Easements
- 7924 - Property Reconciliation

The primary source of information about the parcel is retrieved from the acquisition documents: e.g., grant deed, title report, etc.

1. **Action Type (Mandatory)** – Check the appropriate box for the type of action to be taken. This identifies the action that will be taken to process a particular record. There are three action types:

- | | |
|----------|--|
| Add – | Use this action type when entering a new Parcel record to the SPI for the first time. |
| Change – | Use this action type when any change is being applied to an existing SPI Parcel record. |
| Delete – | Use this action type to remove an existing Parcel record from the SPI database. This process will not be allowed until all lower level records for a Parcel have been deleted first. |

Real Property

2. **Real Property Number** – This item will be assigned by the SPI unit if the parcel is being added to a new real property. Enter the Real Property Number (RP#) if the parcel is being changed or deleted to an existing real property.
3. **Real Property Name** – If “Add” was checked in item 1, enter the Real Property Name your agency wants assigned.

CURRENT PARCEL SERIES

4. **Group Type** – The SPI groups the property rights acquired for a particular parcel of land in one of the following types. Enter the appropriate code that identifies the type of property rights being acquired:
 - 1 = Fee – An ownership without limitation
 - 2 = Easement – A limited right or interest in the land of another
 - 3 = Rights Retained – A right or an interest retained by the State in a conveyance
 - 4 = Lease Hold – A writing constituting a conveyance of real property for a specified term and a contract for its possession during that term
5. **Parcel History Number** – Enter the unique Parcel History Number (PH#) assigned to the acquisition parcel. The SPI Unit will assign the PH# to all new parcels when “Add” is checked in item 1. The number will be assign at the time the parcel information is entered on the SPI database. Enter the PH# assigned to an existing parcel if “Change” or “Delete” was checked in item 1. The PH# can be found in either the agency’s records or the RE21 parcel report(s) submitted for annual verification.
6. **Parcel Series** – A sequential number that is used to distinguish the different property rights acquired and retained on a parcel. Every PH# assigned must have at least one Parcel Series Number. When adding a new parcel and parcel series, “001” will be assigned as the first Parcel Series Number.
7. **Agency Parcel Number (Optional)** – This is the agency’s own number that uniquely identifies a parcel. The agency is encouraged to complete this field in order to facilitate the reconciliation of data between agency, SPI and State Controller’s Office (SCO).
8. **Address Number** – Enter the number portion of the street address for the structure: i.e., **1234** State Road.
9. **Address Street** – Enter the street name for the structure: i.e., **1234 State Road**.
10. **Address 2** – Enter any additional address information: i.e., **Suite No. 101, PO BOX 567**.
11. **City Code** – Enter the City Code for where the property is located. See a listing of City Codes used by the SPI on page 43 – City Table.
12. **County Code** – Enter the County Code for where the property is located. See a listing of County Codes used by the SPI on page 72 – County Table.
13. **State Code** – Enter the State Code for where the property is located. See a listing of State Codes used by the SPI on page 97 – State Table.
14. **Country Code** – Enter the Country Code for where the property is located. See a listing of Country Codes used by the SPI on page 71 – Country Table. The database will default to USA.

15. **Original Acreage** – Enter the total acres the parcel consisted of at the time of purchase or transfer of control and possession. This field only changes if the original acreage was entered incorrectly into the SPI.
16. **Current Parcel Series Comments** – Enter any pertinent comments to the parcel: i.e., NW ¼ of NW ¼ of Sec. 02, T01N, R10E, MDB&M.

ACQUISITION HISTORY LAND

17. **Grantor** – Enter the name of the person or entity granting the parcel to the State.
18. **Manner Acquired** – Enter the Manner Acquired Code indicating the type of instrument used to originally acquire title to the parcel. See a listing of Manner Acquired Codes used by the SPI on page 93 – Manner Acquired Table.
19. **Instrument Date** – Enter the date the document (grant deed, easement, etc.) was signed by the grantor: i.e., MM/DD/YYYY.
20. **Recorded Date** – Enter the date the document (grant deed, easement, etc.) was recorded by the county recorder; e.g., MM/DD/YYYY.
21. **Recorded Book/Date** – Enter the book number or four digit year and two digit month (YYYYMM) assigned by the county recorder to the specific acquisition document.
22. **Recorded Page/Doc. #** – Enter the page or document number assigned by the county recorder to the specific acquisition document.
23. **Percent Ownership** – Enter the percentage of interest acquired on a parcel. A separate transaction will be recorded for each partial interest acquired for a parcel: i.e., if a parcel is acquired by two deeds with two different grantors and each grantor has a 50% undivided interest in the parcel, then two transactions would be recorded for the parcel.
24. **Transaction Acreage** – Enter the amount of acreage added or subtracted to the total acreage of a parcel for each transaction being applied to the parcel.
25. **Transaction Fiscal Year** – Enter the fiscal year in which the transaction is funded in the, i.e. YYYY/YYYY.
26. **Purchase Price** – Enter the original purchase price of an acquired parcel of land. This is the **historic value** of the land. This value normally does not change unless it was incorrectly entered into the SPI, partial ownerships are acquired for the same parcel by multiple transactions, or a portion of the parcel is sold. If a portion of the parcel is sold, the Purchase Price is reduced by the prorated price of the parcel (purchase price[\$1,000] ÷ number of acres[1.00 acre] = prorated price of parcel[\$1,000 per acre] x acreage sold[0.50 acre sold] = amount purchase price is reduced[\$500]). Refer to SAM Section 8600 for instructions for reporting the costs of purchasing a Parcel.
27. **Estimated Gift Value** – Enter the fair market value at the time of the gift for the parcel being donated to the State. Refer to SAM Section 8600 and 1322.14 for instructions for reporting land donations to the State. For SPI purposes all parcels acquired via a mitigated land transaction will be processed like a gift parcel and mitigated value entered as a gift.
28. **Acquisition Cost** – At the discretion of the agency enter the agency's internal cost to acquire a parcel, exclusive of the parcel (land) costs. DO NOT MAKE AN ENTRY FOR ITEM 28 if these costs were previously entered in item 26.

29. **Primary UCM Funding Source Number** –

The numerical code that identifies the primary state fund used to construct or purchase a parcel of land. The funding source is established by the Department of Finance and is published in the UCM. See www.dof.ca.gov/html/calstars/ucm.htm for a listing of the codes that are currently being used or see the Funding Source Table used by the SPI on page 78 – Funding Source Table.

30. **Multiple Funding Flag** - Enter “Yes” or “No” to indicate whether or not the parcel has more than one funding source. Enter additional funding source information in the Current Parcel Series Comments section (item 13).

31. **Document Number** – This is an optional field that holds 8 characters. It is used for an agency-assigned number to identify the file containing the source documents that contain acquisition, construction and related financial information.

32. **Title Insured Flag** – Enter “Yes” or “No” to indicate whether or not title insurance was purchased for the parcel at the time of the acquisition.

CURRENT PARCEL CHARACTERISTIC(S)

33. **Parcel Characteristic Code** – Enter the code corresponding to a characteristic of the parcel. See a listing of Parcel Characteristic Codes used by the SPI on page 73 - Parcel Characteristic Table.

34. **Commence Term Date** -This is an optional field. Enter the beginning date of a contract, agreement, sale, etc.

35. **End Term Date** - This is an optional field. Enter the ending date of a contract, agreement, sale, etc.

36. **Current Parcel Characteristic Comments** – Enter essential comments relating to a given parcel characteristic.

CURRENT PARCEL SERIES LOCATION(S)

37. **Current Parcel Series Location** – This entry is used to locate a parcel within the U.S. Public-Land surveys. The public lands are subdivided into townships, sections and quarter sections (SPI only captures the location to the section). There are three initial points in California used to identify a township. These points are commonly referred to as the Humboldt Base and Meridian, Mount Diablo Base and Meridian and San Bernardino Base and Meridian.

Enter the acronym assigned to one of the three base-meridians along with the township, range and section: i.e., Base Meridian Code: MD Township: T01E Range: R01N Section 01.

HB = Humboldt Base Meridian
MD = Mount Diablo Base Meridian
SB = San Bernardino Base Meridian

Contact the SPI unit if you have questions or need assistance in completing this entry.

CURRENT ASSESSOR PARCEL(S)

38. **Current Assessor Parcel** – Enter the number(s) assigned by the County Assessors Office to identify the parcel(s) being acquired. The Assessor Parcel is made up of the following three components:

County Assessors' Map Book Number
County Assessors' Map Book Page/Block Number
County Assessors' Individual Parcel Number

STATEWIDE PROPERTY INVENTORY
INSTRUCTIONS FOR COMPLETING
STRUCTURE DATA ENTRY FORM 1040

1. Action type (Mandatory) ☐ Add ☐ Change ☐ Delete

[illegible]

33. Manner Acquired: _____ 34. Instrument Date: ____/____/____ 35. Project Type: ____

36. Transaction Fiscal Year ____/____ (YYYY/YYYY)

37. Cost of Structure/Site Improvement: \$____,____,____.____

38. Additions: \$____,____,____.____

39. Primary UCM Funding Source Number: _____ 40. Multiple Funding: ____

41. Document Number: _____

STRUCTURE/SITE IMPROVEMENT CHARACTERISTIC(S)

42. Structure/Site Improvement Characteristic Code: _____ 43. Applicable Date: ____/____/____

44. Estimated Cost: \$____,____,____,____,____

45. Structure/Site Improvement Characteristic Comments:

42. Structure/Site Improvement Characteristic Code: _____ 43. Applicable Date: ____/____/____

44. Estimated Cost: \$____,____,____,____,____

45. Structure/Site Improvement Characteristic Comments:

42. Structure/Site Improvement Characteristic Code: _____ 43. Applicable Date: ____/____/____

44. Estimated Cost: \$____,____,____,____,____

45. Structure Characteristic Comments:

STRUCTURE/SITE IMPROVEMENT DATA ENTRY FORM

PURPOSE OF RESD FORM 1040

The RESD Form 1040 is used for reporting an agency's structures or site improvements. A structure or site improvement is defined as being any manmade object permanently attached to the land and used in an agency's program to house state employees and equipment. The form captures the structure address as well as the fixed asset information for State owned structures and subsequent additions. Work which has been funded from a minor capital outlay or an operations and equipment appropriation are considered repairs.

INSTRUCTIONS AND DEFINITIONS

All data fields must be completed for a Structure/Site Improvement regardless of the fixed asset costs required by SAM Section 8600 to meet the requirements of the California Government Code Section 11000-11019.9. DGS may require additional Structures/Site Improvements be reported for other program requirements and needs.

Agency should refer to SAM Section 8600 for instructions for completing the fixed asset costs for Structures or Site Improvements.

1. **Action Type (Mandatory)** – Check the appropriate box for the type of action to be taken. This identifies the action that will be taken to process a particular record. There are three action types:
 - Add – Use this action type when entering a new Structure or Site Improvement record to the SPI for the first time.
 - Change – Use this action type when any change is being applied to an existing SPI Structure or Site Improvement record.
 - Delete – Use this action type to remove an existing Structure or Site Improvement record from the SPI database. This process will not be allowed until all lower level records for a Structure have been deleted first.

STRUCTURE/SITE IMPROVEMENT

2. **State Owned Code** - Code 3 indicates the structure is or will be State owned. No action is required.
3. **Structure/Site Improvement Group** – Enter one of the following codes:
 - 2 = Structure (Building): i.e., Office Building, Dormitory, Garage, etc.
 - 3 = Improvement: i.e., Utility Tunnel, Fencing, Ramp, etc.
4. **Structure/Site Improvement Number** – The SPI unit will assign the Structure Number/Site Improvement (Str#) if action type "Add" was checked in item 1. The Str# must be entered if action type "Change" or "Delete" was checked in item 1 for an existing Structure/Site Improvement. The Structure/Site Improvement Number can be found on the RESD Structure Report RE24.

5. **Real Property Number** – The Real Property Number (RP#) will be assigned by the SPI Unit if the structure is being added to a new real property. Enter the RP# found on the RESD Structure Report RE20 if the structure is located on an existing Real Property.
6. **Real Property Name** – No entry is required. This field will be populated with the Real Property Name from the entry made on the Real Property Form 1010.
7. **Structure/Site Improvement Name** – This item must be completed for all new Structures/Site Improvements. The name used is either the name designated by the legislature or the agency. The name designated by the legislature will take precedence over a name assigned by the agency.
8. **Address Number** – Enter the number portion of the street address for the structure: i.e., **1234** State Road.
9. **Address Street** – Enter the street name for the structure: i.e., 1234 **State Road**.
10. **Address 2** – Enter any additional address information: i.e., **Suite No. 101, PO BOX 567**.
11. **City Code** – Enter the City Code for where the structure is located. See a listing of City Codes used by the SPI on page 43 – City Table.
12. **County Code** – Enter the County Code for where the structure is located. See a listing of County Codes used by the SPI on page 72 – County Table.
13. **State Code** – Enter the State Code for where the structure is located. See a listing of State Codes used by the SPI on page 97 – State Table.
14. **Zip Code** – Enter the official US Postal Zip Code and Zip + 4 for the location of the property.
15. **Country Code** – Enter the Country Code for where the structure is located. See a listing of Country Codes used by the SPI on page 71 – Country Table. The database will default to USA.
16. **Thomas Bros** – This item is optional. This item would be completed using a Thomas Brothers Map book. Indicate the map book name: (i.e., Sac for Sacramento), the page number and grid in which the property is located.
17. **Agency Region** – The agency can assign a structure to a specific geographic area (region or district). The region/district can be identified using ten characters: i.e., District 10, Region IX, etc. Completing this item will enable reports to be generated by a particular region/district.
18. **Agency Structure/Site Improvement Number** – The identifier assigned by the agency to a specific Structure or Site Improvement. When completed, this number would cross-reference to the SPI Structure Number.
19. **Billing Code** – For SPI Use Only. No action is necessary.
20. **Owner Agency Number** – The Uniform Codes Manual (UCM) Organization Code for the agency that has control and jurisdiction of the Structure. See www.dof.ca.gov/html/calstars/ucm.htm for a listing of all current UCM Codes or see a listing of UCM Codes used by the SPI on page 36 – Agency Table.

The agency must contact the Department of Finance to establish new organization codes. When reporting new Real Properties or new Structures, the organization code must be reported to the SPI.

21. **Owner Agency Acronym** – Enter the standard abbreviation for an agency’s name. See a listing of Agency Acronyms used by the SPI on page 36 – Agency Table. Correct your Agency’s Acronym if it is incorrect.
22. **Managing Agency Number** – Normally this is the same number used in item 20. If the owning agency is allowing another organization to manage a structure, then the other organization’s UCM code would be entered. Contact the SPI unit for assistance.
23. **Managing Agency Acronym** – Normally this is the same acronym used in item 21. Contact the SPI unit for assistance if another organization is managing the structure.
24. **Structure/Site Improvement Type Code** – A code used to identify the primary purpose of a Structure. A Structure/Site Improvement may have multiple uses, however, enter only the code for the primary use: i.e., a warehouse (primary use) may also contain a small office area. See a listing of Use Codes used by the SPI on page 102 – Use Table. Select the appropriate use for the Structure/Site Improvement being entered from the table and enter the code in this item.
25. **Condition Code** – Enter one of the following codes:

<u>Condition Code</u>		<u>Condition Description</u>
1	=	New: Newly constructed, no previous tenant improvements and in compliance with all applicable codes and ordinances.
2	=	Good: Existing structure and improvements in compliance with all applicable codes and ordinances – should be easy to maintain and modify.
3	=	Fair: Existing structure and improvements require minor modifications to comply with codes.
4	=	Poor: Existing structure and improvements requiring “major” or “minor” capital outlay to comply with codes.
5	=	Untenable: Officially condemned or restricted from its intended use or the code compliance modification expense is higher than the building value.

26. **Number of Floors** – Enter the number of floors contained within the structure.
27. **Square Feet** – Enter the total inside gross square footage of the Structure. The measurement is the sum of the areas of each floor within the surface of the exterior walls. This field will be left blank for Site Improvements and an entry made in the Structure/Site Improvement Comment field as to type of measurement used to record the Site/Improvement, i.e. linear feet (l.f.), cubic feet (c.u.), etc.
28. **Year Built** – Enter the four digit year in which the Structure/Site Improvement was built or completed.

29. **Current Program Use** – A code that identifies the agency’s current program use status for a structure. A program is defined as a group of interdependent or interrelated activities directed toward the achievement of a common goal or objective: i.e., operation of a prison facility. Use one of the following codes:

Codes: 1000 – Used for state program
9000 – Not used for state program

30. **Projected Program Use** – A code that identifies the agency’s projected program use status for a structure. This item would use the same code entered in item 29 until it is anticipated that the use would change. Use one of the following codes:

Codes: 1000 – Used for state program
9000 – Not used for state program

31. **Projected Program Use Date** – Enter the date the structure entered into service or the projected date the use status of the structure will change.

32. **Comments** – Enter all pertinent comments relating to the Structure/Site Improvement: i.e. an additional name for the structure, additional funding sources, additional cost information, etc.

ACQUISITION HISTORY STRUCTURE/SITE IMPROVEMENT

33. **Manner Acquired** – Enter one of the following codes to indicate whether the Structure/Site Improvement was acquired (purchased) or constructed:

1 – Acquired – The structure was purchased at the same time the land was acquired.

2 – Constructed – The structure was constructed after the land was purchased.

34. **Instrument Date** – Enter the date the Structure/Site Improvement was acquired (purchased), construction was completed or the Structure/Site Improvement was entered into service (date of occupancy).

35. **Project Type** – Enter one of the following:

Code Description

1000 New Construction - A newly constructed building or improvement.

2000 Acquired - Acquired either with the land acquisition or via a bill of sale.

3000 Addition - An enhancement to an existing building or improvement.

4000 General Rehabilitation- Renovation to upgrade and meet current building standards.

4005 HVAC Rehabilitation - Renovation and upgrade of HVAC to meet current building standards.

4010 Elevator Rehabilitation – Renovation and upgrade of elevator system to meet current building standards.

36. **Transaction Fiscal Year** – Enter the fiscal year in which the transaction is funded, i.e. YYYY/YYYY.

37. **Cost of Structure/Site Improvement** – Refer to SAM Section 8600 for instructions for entering the fixed assets costs of a Structure or Site Improvement.

38. **Additions** – Refer to SAM Section 8600 for instructions for entering the costs for additions.

Note for Items 36 and 37: If a structure is being deleted from an agency's inventory, a negative (-) dollar amount equal to the value shown for each of the items must be reported. The SPI database will not allow the structure to be deleted until the items have a zero balance.

39. **Primary UCM Funding Source Number** – The numerical code that identifies the primary state fund used to construct or purchase a structure. The funding source is established from the Department of Finance and is published in the UCM. See www.dof.ca.gov/html/calstars/ucm.htm for a listing of the codes that are currently being used or see a listing of Funding Source Codes used by the SPI on page 78 – Funding Source Table.

40. **Multiple Funding** – Enter “Yes” or “No” to indicate whether or not multiple fund sources were used to construct or acquire the structure. Enter additional funding source information in the Structure Comments (item 32).

41. **Document Number** – An agency assigned identifier (8 characters in length) for the file containing the source documentation: i.e., acquisition, construction and related financial information.

STRUCTURE/SITE IMPROVEMENT CHARACTERISTICS

42. **Structure Characteristic Code** – A unique code that identifies a particular characteristic of a building such as fire/life safety and asbestos inspection. See a listing of Structure Characteristic Codes used by the SPI on page 98 – Structure Characteristic Table. Select the appropriate use for the structure being entered from the table and enter the code in this item.

43. **Applicable Date** – The date used to determine when a Structure Characteristic is to be applied: i.e., state fire marshal report, asbestos survey date, etc. A date is mandatory. If no specific date is applicable, enter the current date.

44. **Estimated Cost** – The estimated cost associated with a given Structure Characteristic or predicted future cost to correct applicable condition.

45. **Structure/Site Improvement Characteristic Comments** – Additional comments related to the Structure Characteristic.

HOW TO MAKE CHANGES TO THE NEW SPI ANNUAL VERIFICATION USING RE-20, RE-21 AND RE-24 REPORTS

In the past, corrections were made in red so that they would stand out on paper. Now that we are using an electronic format, making changes in red may not be enough. Please change the font color to red, font size to 10 and bold the corrections that need to be made. If there are additional comments that you would like added, please add them at the end of the comments sections. Attached are examples of the three forms generated by the SPI with examples of how we would like the changes to be shown.

Even though we are using an electronic format for the verification, these changes will be keyed into the SPI database by staff. As with the paper format of previous years, the SPI staff only wants the reports that have changes on them returned. However your agency sends the documents back to the SPI - e-mail, disk or paper format - please be sure that the corrections stand out from everything else on the document. Staff may be printing these reports and making the changes to the SPI from them.

Thank you for your time and understanding during the implementation of this process.

Statewide Property Inventory Staff

DEPARTMENT OF GENERAL SERVICES
OFFICE OF REAL ESTATE AND
DESIGN SERVICES

REPORT RE20
07/11/2003
PAGE 1

REAL PROPERTY REPORT

REAL PROPERTY NUMBER: 123-STATEWIDE PROPERTY INVENTORY LAND **SPI**

----- OVERALL PROPERTY INFORMATION -----

UCM AGENCY NUMBER: 1234 BUSINESS OPERATIONS POLICY & PLANNING BILLING CODE: 12345
AGENCY PROPERTY NUMBER: AGENCY REGION: BOPP

THOMAS BROS.MAP-BOOK: PAGE: GRID:

ESTIMATED VALUE: DATE OF ESTIMATE:

REAL PROPERTY DESCRIPTION:

707 THIRD STREET, 5TH FLOOR, WEST SACRAMENTO, CA 95605

REAL PROPERTY ESTIMATE COMMENTS:

PROGRAM USE CODE: 1000 USED BY STATE PROGRAM

PROJECTED PROGRAM USE CODE: 1000 USED BY STATE PROGRAM

PROJECTED PROGRAM USE DATE: 11/07/1996

LAND USE CODE: 1110 FORESTRY MANAGEMENT

CURRENT USE ACRES: .05

SURPLUS FLAG: N ESTIMATED VALUE: DATE OF ESTIMATE:

LOCATION DESCRIPTION:

TOTALS FOR REAL PROPERTY : 10120-SONOMA - LAKE - NAPA UH

GROUP TYPE -

LAND VALUES -

STRUCTURE VALUES -

FEE INTEREST:	0.05 ACRES	PURCHASE PRICE :	\$5,000.00	COST OF STRUCTURE:	\$500.00
EASEMENT INTEREST:	0.00 ACRES	GIFT VALUE :	\$0.00	COST OF ADDITIONS:	\$0.00
RIGHTS RETAINED:	0.00 ACRES	MITIGATED VALUE:	\$0.00	COST OF RETROFIT :	\$0.00
LEASEHOLD INTEREST:	0.00 ACRES	ACQUISITION COST:	\$0.00	COST OF IMPROVEMENTS:	\$0.00

REAL PROPERTY REPORT BY : Agency Number, Real Property Number

DEPARTMENT OF GENERAL SERVICES
OFFICE OF THE REAL ESTATE AND
DESIGN SERVICES

REPORT RE21
07/11/2003
PAGE: 1

PARCEL HISTORY REPORT

AGENCY: 1234 BUSINESS OPERATIONS POLICY & PLANNING

REAL PROPERTY NUMBER: 123-SPI LAND

PARCEL HISTORY NUMBER: 2501234 SERIES: 1

----- PARCEL INFORMATION -----

GROUP TYPE: 1-FEE

LAST UPDATE DATE: 12/05/2001

PARCEL HISTORY NUMBER: 2501234 SERIES: 1

AGENCY PARCEL NUMBER: DGS 123

COUNTY: 57-YOLO

CITY: 6310-WEST SACRAMENTO

STATE: CA-CALIFORNIA

COUNTRY: 1-UNITED STATES

ORIGINAL ACREAGE: 0.05

TRANSACTION DATE: 01/19/2001 08:26:24

PROCESS TYPE: ADD

TITLE INSURED: Y

LAST UPDATE DATE: 11/10/2002

GRANTOR: THE MONEY STORE

MANNER ACQUIRED CODE: 100-GRANT DEED-FEE

INSTRUMENT DATE: 12/01/2000

RECORDED DATE: 12/05/2000	PERCENT	TRANSACTION	PURCHASE	ESTIMATED	MITIGATED	ACQUISITION
RECORDED BOOK: 2000	OWNERSHIP:	ACREAGE:	PRICE:	GIFT VALUE:	LAND VALUE:	COST:
RECORDED PAGE: 01234	100%	0.05	\$5,000.00	\$0.00	\$0.00	\$0.00

FUNDING SOURCE NUMBER: 1-GENERAL FUND

MULTIPLE FUNDING: N REPORTABLE: Y DOCUMENT NO:

PARCEL SERIES COMMENT(S):

707 THIRD STREET, 5TH FLOOR, WEST SACRAMENTO, CA 95605

GRANTED PUBLIC UTILITY EASEMENT (Don't forget to send in the recorded document.)

PARCEL CHARACTERISTIC(S):

1000 FEE TITLE

COMMENCE TERM:

END TERM:

LAST UPDATE: 11/10/2002

COMMENTS:

DEPARTMENT OF GENERAL SERVICES
OFFICE OF THE REAL ESTATE AND
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REPORT RE21
07/11/2003
PAGE: 2

PARCEL HISTORY REPORT

AGENCY: 1234 BUSINESS OPERATIONS POLICY & PLANNING

REAL PROPERTY NUMBER: 123-SPI LAND

PARCEL HISTORY NUMBER: 2501234 SERIES: 1

PARCEL CHARACTERISTIC(S):

1030 ROAD EASEMENT

COMMENCE TERM: END TERM: LAST UPDATE: 11/10/2002

COMMENTS:

ROAD EASEMENT FOR PUBLIC USE

ASSESSOR PARCEL NUMBER(S):

00001-0002-003

BASE & MERIDIAN-TOWNSHIP-RANGE-SECTION(S):

MD-T01.0N-R02.0W-03

=====

PARCEL TOTALS

=====

PERCENT OF OWNERSHIP: 100%	CURRENT ACREAGE:	PURCHASE	ESTIMATED	MITIGATED	ACQUISITION
	0.05	PRICE:	GIFT VALUE:	LAND VALUE:	COST:
		\$5,000.00	\$0.00	\$0.00	\$0.00

=====

PARCEL HISTORY REPORT BY: Agency Number, Group type, County Name, Real Property Name

DEPARTMENT OF GENERAL SERVICES
OFFICE OF REAL ESTATE AND
DESIGN SERVICES

REPORT RE24
07/11/2003
PAGE 1

STRUCTURE REPORT

REAL PROPERTY NUMBER: 123-SPI LAND

STRUCTURE NUMBER: 12345

----- STRUCTURE INFORMATION -----

STATE OWNED CODE: 3-STATE OWNED STRUCTURE GROUP: 2-STRUCTURES LAST UPDATE DATE: 12/05/2001

STRUCTURE NUMBER: 12345 STRUCTURE NAME: SPI OFFICES

ADDRESS: 707 THIRD STREET

ADDRESS2: FIFTH FLOOR
CITY: 6310-WEST SACRAMENTO

COUNTY: 57-YOLO

STATE: CA-CALIFORNIA ZIP CODE: 95605-0000 COUNTRY: 1-UNITED STATES

AGENCY REGION: BOPP THOMAS BROTHERS MAP-BOOK: PAGE: GRID:

OWNING AGENCY: 1234 BUSINESS OPERATIONS POLICY & PLANNING OWNING AGENCY ACRONYM: BOPP

AGENCY STR N0: BILLING CODE: 12345

MANAGING AGENCY: 1234 BUSINESS OPERATIONS POLICY & PLANNING MANAGING AGENCY ACRONYM: BOPP

STRUCTURE TYPE: 2300-OFFICE (GENERAL) PROGRAM USE: 1000-USED BY STATE PROGRAM

PROJECTED PROGRAM USE: 1000-USED BY STATE PROGRAM PROJECTED PROGRAM USE DATE: 12/02/2001

YEAR BUILT: 1990 CONDITION: 2-GOOD NUMBER OF FLOORS: 10 SQUARE FOOTAGE: ~~8,700~~ **9,000**

-

-
TRANSACTION DATE: 01/19/2001 01:08:26 PROCESS TYPE: ADD LAST UPDATE DATE: 10/11/2002

MANNER ACQUIRED: 1-ACQUIRED INSTRUMENT DATE: 12/01/2000

PROJECT TYPE: 1000-NEW CONSTRUCTED

COST OF STRUCTURE: COST OF IMPROVEMENTS: COST OF ADDITIONS: COST OF RETROFIT: ACQUISITION COST:

\$500.00

\$30,000

FUNDING SOURCE NUMBER: - MULTIPLE FUNDING: REPORTABLE: Y DOCUMENT NO:

-

STRUCTURE COMMENT(S):

THIS WAS THE OFFICE WAREHOUSE ACQUIRED FROM PG & E WHICH HAS BEEN MODIFIED - REBUILT AND ADDED ONTO.
Additions for this building added 1,300 sq ft. Cost of addition is \$30,000.

STRUCTURE CHARACTERISTIC(S):

=====

STRUCTURE TOTALS

=====

TOTALS FOR STRUCTURE: 12345

COST OF STRUCTURE:	COST OF IMPROVEMENTS:	COST OF ADDITIONS:	COST OF RETROFIT:	ACQUISITION COST:
\$500.00		\$30,000		

=====

STRUCTURE REPORT BY: State Owned Code, Owner Agy No., Real Property No., Str Group, Str No.

DEPARTMENT OF GENERAL SERVICES
REPORT RE24

OFFICE OF REAL ESTATE AND
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DESIGN SERVICES
PAGE 1

STRUCTURE REPORT

REAL PROPERTY NUMBER: 123-SPI LAND

STRUCTURE NUMBER: 67890

STRUCTURE INFORMATION

STATE OWNED CODE: 3-STATE OWNED
LAST UPDATE DATE: 12/05/2001

STRUCTURE GROUP: 2-STRUCTURES

STRUCTURE NUMBER: 67890

STRUCTURE NAME: SPI OFFICES

DELETE: BUILDING DEMOLISHED

06/30/2003

ADDRESS: 707 THIRD STREET

ADDRESS2: FIFTH FLOOR
CITY: 6310-WEST SACRAMENTO

COUNTY: 57-YOLO

STATE: CA-CALIFORNIA

ZIP CODE: 95605-0000 COUNTRY: 1-UNITED STATES

AGENCY REGION: BOPP

THOMAS BROTHERS MAP-BOOK:

PAGE:

GRID:

OWNING AGENCY: 1234 BUSINESS OPERATIONS POLICY & PLANNING

OWNING AGENCY ACRONYM: BOPP

AGENCY STR N0:

BILLING CODE: 12345

MANAGING AGENCY: 1234 BUSINESS OPERATIONS POLICY & PLANNING
BOPP

MANAGING AGENCY ACRONYM:

STRUCTURE TYPE: 2300-OFFICE (GENERAL)
PROGRAM

PROGRAM USE: 1000-USED BY STATE

PROJECTED PROGRAM USE: 1000-USED BY STATE PROGRAM
12/02/2001

PROJECTED PROGRAM USE DATE:

YEAR BUILT: 1990 CONDITION: 2-GOOD

NUMBER OF FLOORS: 10

SQUARE FOOTAGE: 1,000

TRANSACTION DATE: 01/19/2001 01:08:26
LAST UPDATE DATE: 10/11/2002

PROCESS TYPE: ADD

MANNER ACQUIRED: 1-ACQUIRED
12/01/2000

INSTRUMENT DATE:

PROJECT TYPE: 1000-NEW CONSTRUCTED

COST OF STRUCTURE: COST OF IMPROVEMENTS: COST OF ADDITIONS: COST OF RETROFIT:
ACQUISITION COST:

\$800.00

FUNDING SOURCE NUMBER: -
REPORTABLE: Y DOCUMENT NO:

MULTIPLE FUNDING:

STRUCTURE COMMENT(S):

~~This structure has been demolished. Delete from the SPI~~

STRUCTURE CHARACTERISTIC(S):

=====

STRUCTURE TOTALS

=====

TOTALS FOR STRUCTURE: 12345

COST OF STRUCTURE: COST OF IMPROVEMENTS: COST OF ADDITIONS: COST OF RETROFIT:
ACQUISITION COST:

\$800.00

=====

STRUCTURE REPORT BY: State Owned Code, Owner Agy No., Real Property No., Str Group, Str No.